

Using the Kuali: Fixed Asset Transfer Request Form

The Fixed Asset Transfer Request is an electronic workflow used to update equipment location and ownership within or between departments. Tagged equipment is tracked in Banner with a location and responsible organization code, designating the department and Budget Unit Director in charge. All transfers must be submitted through the [Kuali system](#), which replaces the previous Banner process. As a reminder, **Intradepartmental requests** are used for a location change only, while **Interdepartmental requests** are used for location and department change. For details, visit: [ODU Fixed Assets Accounting](#).

Questions? Email: FixedAssets@odu.edu.

Accessing the Fixed Asset Transfer Request Form

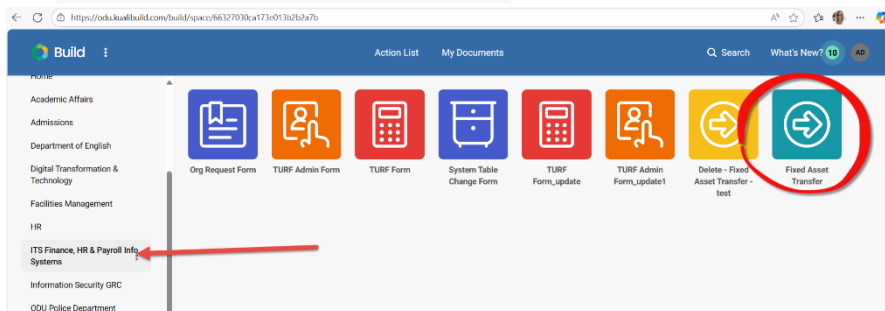
1. Navigate to the **Kuali** system, as accessed via the [ODU Portal](https://portal.odu.edu/) (<https://portal.odu.edu/>). Follow the QR Code below to directly access the system.



NOTE: Your Midas Credentials are required for access. For questions related to your Midas Credentials, please contact the ITS Help Desk directly (itshelp@odu.edu or 757.638.3192).

ITS Finance, HR & Payroll Info Systems

2. Select the **ITS Finance, HR & Payroll Info Systems** tab from the left menu bar.



3. You will be directed to the ITS Finance, HR & Payroll Systems Dashboard. The **Fixed Asset Transfer Request Form** may be found on this screen (see image).

Completing the Fixed Asset Transfer Request Form

After clicking the **Fixed Asset Transfer Icon**, you will be directed to the electronic **Fixed Asset Transfer Request Form**.

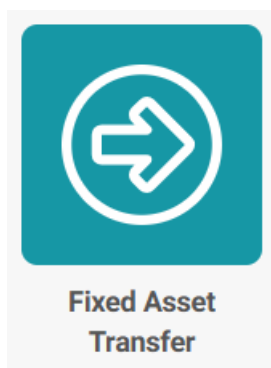
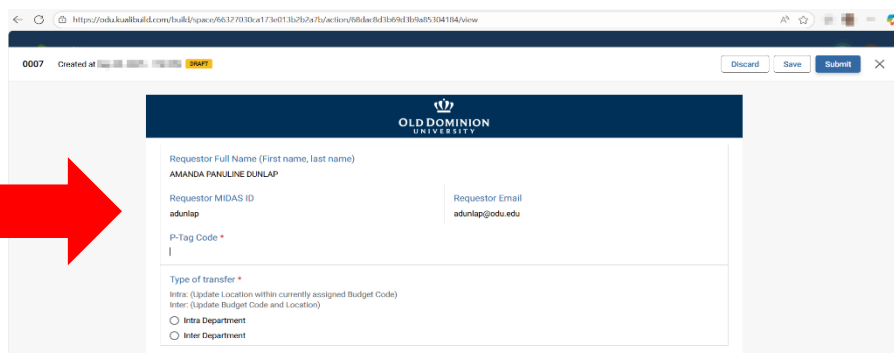



Figure 1 - Fixed Asset Transfer Request Form in the Kuali System

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1. Notice some information auto-populates (Requestor Full Name, MIDAS ID, and email).
2. To use this form, you will have to use a **P-Tag (Property Tag) Code**. You may not proceed through this form without this number.

NOTE: These numbers are 9-characters long (XX-XXXXXX) and may be found on ODU sticker affixed to the asset itself. *See example image.*

For questions about accessing this information or locating this number, contact FixedAssets@odu.edu.



NOTE: All numbers are required before you may proceed. If you try to proceed with an incorrect P-Tag number, you will receive an error message.

P-Tag Code * 77-777777
Looks like you entered incorrect p-tag number. Please verify p-tag number and input it in correct format. Contact fixedassets@odu.edu if you have any issues.

Figure 2 - Incorrect P-Tag Code will result in this error message and you may not proceed through the electronic form until you correct the P-Tag Code data.

- As you begin to type this number into the field, you will notice more details begin to populate beneath the **P-Tag Code** block, (**Description of the asset, Location Code, Manufacturer, Model/Serial Numbers, Location**).

P-Tag Code * 73-395947	
Description Presentation system, 3-series 4K Digital media 350 switcher	Model DMPS3-4K-350-C
Manufacturer Crestron	Serial Number 2320JBH13598
Location Code AE2014	Location

Figure 3 - Asset Details that automatically populate after entering the corresponding P-Tag Code

- A second section also appears, **P-Tag Current Budget Details**. This section shows the existing **Organization Code and Title where the asset is housed, Current BUD details/email, and BUD Midas ID**.

P-Tag Current Budget Details	
Org Code 	
Organization Title 	
Current BUD Last Name 	Current BUD First Name
Current BUD Email @odu.edu	Current BUD MIDAS ID

Figure 4 - Existing P-Tag BUD, Org Code, and Contact Details

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- Next you will select either an **Intra** (location update only but the asset will continue to be assigned to the existing Organization Code) or an **Inter Department Transfer** (both Organization Code and Location will change) for the Asset. Select the appropriate radio button on the form (see below).

Type of transfer *

Intra: (Update Location within currently assigned Budget Code)
Inter: (Update Budget Code and Location)

- ☐ Intra Department
☐ Inter Department

- If you select **Intra Department**, you will only be required to provide the new location details, as these transfers remain within the same budget code. Please provide all **Location** details (*Building and Room #*) as indicated in the form.

Type of transfer *

Intra: (Update Location within currently assigned Budget Code)
Inter: (Update Budget Code and Location)

- ☒ Intra Department
☐ Inter Department

Move asset to another location within the department. Please provide new building and room number: (Example: Rollins Hall, 204A) *

- If you select **Inter Department**, you will be required to provide an accurate **Organization Code** for the asset's new location. You must also provide specific **Location** information as indicated in the form (*Building and Room #*).

Type of transfer *

Intra: (Update Location within currently assigned Budget Code)
Inter: (Update Budget Code and Location)

- ☐ Intra Department
☒ Inter Department

To another Department

New Budget Code: (Example: 1CL00) *

New building and room number: (Example: Rollins Hall, 204A) *

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- Upon entering the asset's new Organization Code, **P-Tag New Budget Details** will automatically populate (see below). This will be the new home department/location and BUD for the Asset after the request is processed.

P-Tag New Budget Details	
BUD LAST NAME ELLIS	BUD First Name RANDALL
BUD MIDAS ID rbellis	BUD Email Address rbellis@odu.edu

P-Tag New Budget Details

Please provide valid New Budget Code

NOTE: If you do not provide an accurate **Organization Code**, you will receive an error message and you will not be able to proceed through the form and submit for processing.

From: ODU Kuali Notifications <no-reply@kuali.odu.edu>

To: [Redacted]

Subject: P-Tag: [Redacted] is submitted



[Redacted]

You have submitted Fixed Asset Transfer request form successfully for

P-Tag: [Redacted]

P-Tag Description: ENVELOPE INSERTING SYSTEM

4. After all details are entered accurately, click **Submit**. The form has been submitted, and you will receive an email containing all details related to your request.

NOTE: The updated information from your request will be listed first in the email (*Inter or Intra Department Transfer Request, New Location details, etc.*). You will also receive email updates as each level of approval is received and once final approval is granted. These replies are sent by the sender "**ODU Kuali Notifications.**"

THIS IS NOT SPAM.

Accessing the Workflow Status to Track the Fixed Asset Transfer Request

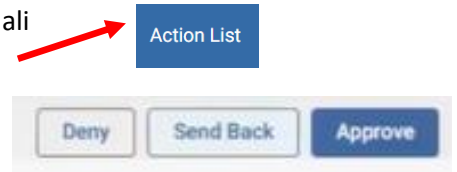
Users may log into the Kuali System at any time to review the Workflow Status of their Fixed Asset Transfer Request.

NOTE: These instructions are also available in the notification emails sent upon submitting a new Fixed Asset Transfer Request Form from ODU Kuali Notifications.

1. Log into the Kuali System (see step 1 from the **Accessing the Fixed Asset Transfer Request Form** section above).

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2. Click the **Action List** button located on the top menu bar of the Kuali System.
3. Select the appropriate P-Tag Code from your list. You will be asked to verify information by selecting a **Send Back**, **Deny**, or **Approve** button. Upon verification, make your selection and you will be able to view the specifics and the status.



NOTE: If Approvers decide to **Send Back** or **Deny** the request, comments may and should be added to the comment block.

- a. If the original request was an **Inter Department Request**, the original BUD assigned to the asset will approve first. Next, the request will be sent to the new BUD to be assigned to the asset for approval. After all required approvals are complete, the Fixed Asset Processor in the Office of Finance will make final approval in the system.
4. If users notice an error at any time, please contact Fixed Assets team at FixedAssets@odu.edu. Provide screenshots and supporting documentation if possible.
5. In lieu of the steps 1-2 above, users may select the **Begin Review** button in the **ODU Kuali Notification** email received after submission to be directed directly to the P-Tag Transfer Request referenced in the email notification after login. From here, Approvers should proceed with 3-4 as referenced above.

Setting up a New Fixed Asset Coordinator for Inter Department Transfer of an Asset

After all BUD approvals are complete for an Inter Department Fixed Asset Transfer Request, a **Fixed Asset Coordinator** within the department must be assigned to the asset following the move. The Fixed Asset Processor or Approvers must add a new Fixed Asset Coordinator of the asset in the system. Most often, this step will be completed as part of the internal final approval step that takes place in the Office of Finance: Fixed Asset Processor office. If not, users will be notified via email by the **ODU Kuali Notifications System** to enter a Fixed Asset Coordinator for the P-Tag Code.

1. Provide the **First & Last Name** for the new Fixed Asset Coordinator of the Asset. Data for this new Fixed Asset Coordinator will automatically populate after entering the correct MIDAS ID. Without this information or if an incorrect ID is entered, users will receive an error message and will not be able to proceed.
2. Click **Submit**. The new Fixed Asset Coordinator will receive an email notification from the ODU Kuali Notification system with the next necessary steps. These include: **Send Back**, **Deny**, or **Approve**.
3. After final approval, the Fixed Asset Processing team in the Office of Finance will key these updates in Banner.

Please enter valid Midas id

NOTE: The originator of the request will also receive an email notification stating, "Transfer of the following asset has been recorded."



Links and Contacts:

Website: [ODU Fixed Assets Accounting](https://portal.odu.edu/).

Email: FixedAssets@odu.edu.

ODU Portal: <https://portal.odu.edu/>